

I am retaining Lottsa Tax & Accounting Services, Inc. (Lottsa) to prepare my 2023 individual income tax return from the information that I am providing.

I have carefully and completely gathered the information for my tax return. Those facts and materials are hereby forwarded to Lottsa.

- I believe that I am reporting all income subject to tax.
- I believe that all of my claims for deductions are valid and can be substantiated.
- I have qualified written acknowledgments for any charitable contributions \geq \$250 being claimed which include a statement similar to “no goods or services were provided in return for this donation”.
- I am aware that records and documents supporting claims of income and deductions must be retained.
- If applicable, I have contemporaneous daily records for self-employment vehicle use, travel, meals, and for the use of “listed property”.
- If total foreign holdings for which I am a signer were valued at \geq \$10,000 at any point during the tax year, I am providing information about those positions.
- We are reporting all cryptocurrency and Non-Fungible Tokens (NFT) holdings as of 12/31/2023 and all related transactions that occurred in 2023.
- I understand that LLC Compliance with the Corporate Transparency Act (“CTA”), including beneficial ownership information (“BOI”) reporting, is not within the scope of this engagement.
- I understand that, as paid preparer, Lottsa is not auditing our information. Lottsa does not attest to the completeness or accuracy of the information provided to Lottsa. That is my responsibility.
- I know that tax returns are subject to review by tax authorities. Lottsa is available to help if there is an inquiry or audit. I understand that additional fees apply for audit replies and representation.

I understand that **the tax return will be prepared for electronic filing with the IRS and any appropriate state tax authority.** Transmittal will not occur until I review the completed tax forms and return the **signed E-file Authorization Form to Lottsa.**

I understand that tax services will be provided at the firm’s hourly rates as stated on the company’s website. Further, I will pay the invoice promptly and in full upon completion of the tax preparation services.

If utilizing the Early Bird Discount, I understand that my Tax Organizer, Engagement Letter, and all of the tax materials that are in my power to produce must be turned in by February 10 to be eligible.

I understand that Lottsa will provide a copy of my final 2023 tax return(s) as a PDF through Lottsa’s secure Client Portal (Canopy) and that it will be my responsibility to download and save the file.

If I prefer a different method of delivery for my 2023 tax return(s), I will make the appropriate entry in the Tax Organizer Questionnaire.

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<i>Taxpayer’s Signature</i>	<i>Date</i>	<i>Spouse’s Signature</i>	<i>Date</i>

Print Name(s)

- Lottsa will carefully handle the tax materials that you provide to Lottsa for preparation and processing of your tax return. Lottsa will process the tax return as quickly, completely, and efficiently as Lottsa is able.
- Lottsa will retain the originals or copies of the Tax Organizer, tax worksheets, and supplemental communications in order to document and support the figures used in preparing the tax return.
- Lottsa will return other original documents to you. Lottsa may retain copies of forms that Lottsa believes to be materially important to the assertions in the tax return.
- Lottsa will comply with the rules of IRS Circular 230 governing ethical conduct of tax practice.

Scott Beers, E.A., CFP®
President of Lottsa

Lottsa

1820 Riverside Ave
Minneapolis, MN 55454
612-338-7459 • www.LOTTSA.com